Update_2_0_112

Clinical Reminders

VA-PHASER TEMPLATE

Install Guide

May 2020

Product Development
Office of Information Technology
Department of Veterans Affairs

Table of Contents

Introduction

This update is for the Pharmacogenomic Testing for Veterans (PHASER) program. The overall goal of PHASER is to improve the efficacy and reduce the toxicity of commonly prescribed medications using pharmacogenomic testing, by incorporating results into the electronic health record and utilizing clinical decision support to guide interpretation and use of test results. Intended users of this template are individuals with permissions to conduct the consent process, place an order for pharmacogenomic testing or enter test results. If patient consent is indicated, the test order dialog will automatically launch at the appropriate point in the process.

This template is mandatory at engaged sites. Site engagement will be rolled out nationally in planned increments. All sites should ensure the template is installed. POC is Jennifer Chapman (jennifer.chapman2@va.gov).

PHASER VA Provider information and Site Deployment Materials: PHASER-SharePoint (only accessible within the VA firewall). PHASER public website: www.cancer.va.gov/phaser.asp

UPDATE_2_0_112 contains 1 Reminder Exchange entry:
> UPDATE_2_0_112 VA-PHASER TEMPLATE

The exchange file contains the following components:
ROUTINE
> PXRMASU
> PXRMCDEF

TIU TEMPLATE FIELD
> VA-DATE DEFAULT TODAY
> VA-PGX BLANK SPACE
> VA-PHASER SHAREPOINT

HEALTH FACTORS
> VA-REMINDER UPDATES
> VA-UPDATE_2_0_112
> VA-PGX GENE TESTING
> VA-PGX VKORC1 UNINFORMATIVE
> VA-PGX VKORC1 HIGH WARFARIN SENS
> VA-PGX VKORC1 INTERMED WARFARIN SENS
> VA-PGX VKORC1 NORMAL WARFARIN SENS
> VA-PGX TPMT IM OR POOR METABOLIZER
> VA-PGX TPMT UNINFORMATIVE
> VA-PGX TPMT POOR METABOLIZER
> VA-PGX TPMT INTERMED METABOLIZER
> VA-PGX TPMT NORMAL METABOLIZER
> VA-PGX SLCO1B1 UNINFORMATIVE
> VA-PGX SLCO1B1 POOR FUNCTION
> VA-PGX SLCO1B1 DECREASED FUNCTION
> VA-PGX SLCO1B1 NORMAL FUNCTION
> VA-PGX DPYD UNINFORMATIVE

VA-PGX DPYD POOR METABOLIZER
VA-PGX DPYD INTERMED METABOLIZER
VA-PGX DPYD NORMAL METABOLIZER
VA-PGX CYP3A5 UNINFORMATIVE
VA-PGX CYP3A5 POOR METABOLIZER
VA-PGX CYP3A5 INTERMED METABOLIZER
VA-PGX CYP3A5 NORMAL METABOLIZER
VA-PGX CYP2D6 UR OR NORM METABOLIZER
VA-PGX CYP2D6 POSS IM OR UR METABOLIZER
VA-PGX CYP2D6 UNINFORMATIVE
VA-PGX CYP2D6 POOR METABOLIZER
VA-PGX CYP2D6 INTERMED METABOLIZER
VA-PGX CYP2D6 NORMAL METABOLIZER
VA-PGX CYP2D6 IM OR NORM METABOLIZER
VA-PGX CYP2D6 ULTRARAPID METABOLIZER
VA-PGX CYP2C9 POSS PM METABOLIZER
VA-PGX CYP2C9 POSS IM METABOLIZER
VA-PGX CYP2C9 UNINFORMATIVE
VA-PGX CYP2C9 POOR METABOLIZER
VA-PGX CYP2C9 INTERMED METABOLIZER
VA-PGX CYP2C9 NORMAL METABOLIZER
VA-PGX CYP2C19 UNINFORMATIVE
VA-PGX CYP2C19 POOR METABOLIZER
VA-PGX CYP2C19 INTERMED METABOLIZER
VA-PGX CYP2C19 NORMAL METABOLIZER
VA-PGX CYP2C19 RAPID METABOLIZER
VA-PGX CYP2C19 ULTRARAPID METABOLIZER
VA-PGX 8 GENE PANEL
VA-PGX IFNL3 UNINFORMATIVE
VA-PGX IFNL3 UNFAVORABLE
VA-PGX IFNL3 FAVORABLE
VA-PGX CYP4F2 UNINFORMATIVE
VA-PGX CYP4F2 ALTERED FUNCTION
VA-PGX CYP4F2 NORMAL FUNCTION
VA-PGX CYP2C UNINFORMATIVE
VA-PGX CYP2C HIGH SENSITIVITY
VA-PGX CYP2C LOW SENSITIVITY
VA-PGX 11 GENE PANEL
VA-PGX FOLLOW UP LATER
VA-PGX TESTING DECLINED
VA-PGX TESTING ACCEPTED
VA-PGX DECLINE OTHER CONCERN
VA-PGX DECLINE NO INTEREST
VA-PGX DECLINE MED CONCERN
VA-PGX DECLINE TESTING CONCERN
VA-PGX DECLINE PRIVACY CONCERN
VA-PGX PROVIDER EDUCATION

REMINDER SPONSOR
VHA ONCOLOGY
OFFICE OF NURSING SERVICE

REMINDER TERM
  VA-REMINDER UPDATE_2_0_112
  VA-PGX AUTHORIZED STAFF
  VA-BL CONSENT PREVIOUSLY ACC/DEC/FOL
  VA-BL CONSENT PREVIOUSLY DECLINED
  VA-BL CONSENT PREVIOUSLY ACCEPTED
  VA-BL CONSENT PREVIOUSLY ACCEPTED/DECLINED

REMINDER DEFINITION
  VA-BL CONSENT AND ORDER DECLINED
  VA-BL CONSENT AND ORDER ACCEPTED
  VA-BL CONSENT AND ORDER ACCEPT/DECLINE/DEFER

REMINDER DIALOG
  VA-PHARMACOGENOMIC TESTING FOR VETERANS

Install Details

This update is being distributed as a web host file. The address for the host file is:
http://vista.med.va.gov/reminders/UPDATE_2_0_112.PRD

The file will be installed using Reminder Exchange, programmer access is not required.

If your site is unable to use the LWH option, you will have a vista mail message with subject of UPDATE_2_0_112 and you can use the LMM option to install.

Installation:
=============
This update can be loaded with users on the system. Installation will take less than 15 minutes.

Install Example

If your site is unable to use LWH functionality, use VistA mail to install the exchange file.

To Load the Web Host File. Navigate to Reminder exchange in Vista

At the **Select Action:** prompt, enter **LWH** for Load Web Host File
At the **Input the url for the .prd file:** prompt, type the following web address:
http://vista.med.va.gov/reminders/UPDATE_2_0_112.PRD

You should see a message at the top of your screen that the file successfully loaded. If not, use the LMM option to load the exchange file from your VistA email.

```
+Item  Entry                         Source              Date Packed
  118  UPDATE_2_0_112 VA-PHASER       PLOTT@SALT LAKE CI  04/27/2020@06:43
       TEMPLATE
  119  UPDATE_2_0_113 VA-CAREGIVER    GRIFFITH@SALT LAKE CI  03/05/2020@08:49
       PROGRAM STATUS TEMPLATES
  120  UPDATE_2_0_115 VA-TELERETINOPA GRIFFITH@SALT LAKE CI  03/12/2020@06:40
       THY TEMPLATE UPDATES
  121  UPDATE_2_0_116 VA-TH           GRIFFITH@SALT LAKE CI  03/24/2020@07:31
       EMERGENCY MANAGEMENT TEMPLATES
  122  UPDATE_2_0_117 VA-SCREENING    GRIFFITH@SALT LAKE CI  03/13/2020@06:43
       COVID 19
+          + Next Screen   - Prev Screen   ?? More Actions            >>>
CFE   Create Exchange File Entry      LHF   Load Host File
CHF   Create Host File                LMM   Load MailMan Message
CMM   Create MailMan Message          LR    List Reminder Definitions
DFE   Delete Exchange File Entry      LWH   Load Web Host File
IFE   Install Exchange File Entry     RI    Reminder Definition Inquiry
IH    Installation History            RP    Repack
Select Action: Next Screen// IFE   Install Exchange File Entry
Enter a list or range of numbers (1-382): 118
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry titled **UPDATE_2_0_112 VA-PHASER TEMPLATE** *(in this example it is entry 118, it will vary by site)*

```
        Component                              Category      Exists
Source:     PLOTT,JOSEPH G at SALT LAKE CITY
Date Packed: 04/27/2020@06:43:33
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-PHARMACOGENOMIC TESTING FOR VETERANS

REMINDER TERM
  VA-REMINDER UPDATE_2_0_112

Keywords:

Components:

+          Enter ?? for more actions                                  >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.
Select Action: Next Screen// IA   Install all Components
During the installation, you will see several prompts:
You will Install (I) all new components and Skip (S) any existing components

Next, you will be prompted to install the dialog component:

```
Packed reminder dialog: VA-PHARMACOGENOMIC TESTING FOR VETERANS [NATIONAL DIALOG

 Item  Seq. Dialog Findings                                    Type    Exists
   1      VA-PHARMACOGENOMIC TESTING FOR VETERANS               dialog

   2      10 VA-PHASER NOTE VERSION                             element
             Finding: *NONE*

   3      20 VA-GP PHASER CONSENT/ORDER AND TEST RESULTS         group
             Finding: *NONE*
   4      20.10 VA-GP PHASER CONSENT AND ORDER PLACEHOLDER       group
             Finding: *NONE*
   5      20.10.5 VA-GP PHASER CONSENT AND ORDER INITIAL         group
             Finding: *NONE*
   6      20.10.5.10 VA-GP PHASER CONSENT DISCUSSED              group
             Finding: VA-PGX PROVIDER EDUCATION (HEALTH FACTOR)            X
   7      PXRM VISIT DATE FORCED TODAY                          forced     X
   8      20.10.5.10.10 VA-EL PHASER ORDER PT AGREES            element
+          + Next Screen    - Prev Screen    ?? More Actions
DD   Dialog Details      DT   Dialog Text       IS    Install Selected
DF   Dialog Findings     DU   Dialog Usage      QU    Quit
DS   Dialog Summary      IA   Install All
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** to install the dialog –
VA-PHARMACOGENOMIC TESTING FOR VETERANS
Install reminder dialog and all components with no further changes: Y// ES

```
VA-PHARMACOGENOMIC TESTING FOR VETERANS (reminder dialog) installed from exchang
 Item  Seq. Dialog Findings                                    Type    Exists
   1      VA-PHARMACOGENOMIC TESTING FOR VETERANS               dialog    X

   2      10 VA-PHASER NOTE VERSION                             element   X
             Finding: *NONE*

   3      20 VA-GP PHASER CONSENT/ORDER AND TEST RESULTS         group    X
             Finding: *NONE*
   4      20.10 VA-GP PHASER CONSENT AND ORDER PLACEHOLDER       group    X
             Finding: *NONE*
   5      20.10.5 VA-GP PHASER CONSENT AND ORDER INITIAL         group    X
             Finding: *NONE*
   6      20.10.5.10 VA-GP PHASER CONSENT DISCUSSED              group    X
             Finding: VA-PGX PROVIDER EDUCATION (HEALTH FACTOR)            X
   7      PXRM VISIT DATE FORCED TODAY                          forced     X
   8      20.10.5.10.10 VA-EL PHASER ORDER PT AGREES            element    X
+          + Next Screen    - Prev Screen    ?? More Actions
DD   Dialog Details      DT   Dialog Text       IS    Install Selected
DF   Dialog Findings     DU   Dialog Usage      QU    Quit
DS   Dialog Summary      IA   Install All
Select Action: Next Screen// Q
```

When the dialog has completed installation, you will then be returned to this screen. At the
Select Action prompt, type **Q.**

```
     Component                                            Category    Exists
Source:      PLOTT,JOSEPH G at SALT LAKE CITY
Date Packed: 04/27/2020@06:43:33
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-PHARMACOGENOMIC TESTING FOR VETERANS

REMINDER TERM
  VA-REMINDER UPDATE_2_0_112

Keywords:

Components:

+        + Next Screen   - Prev Screen   ?? More Actions              >>>
IA   Install all Components           IS   Install Selected Component
Select Action: Next Screen// Q
```

You will be returned to this screen. Type Q to quit.
Install Completed
Note: If your site is NOT a participating PHASER site, you do not need to proceed to the Post
Install steps. No further action is needed.

Post Installation

1. **Make the Dialog templates available to be attached to a Personal or Shared template or to be able to attach the dialog to a progress note title.**

   From the Reminders Manager Menu:
   > Select Reminder Managers Menu Option: **CP** CPRS Reminder Configuration
   > CA   Add/Edit Reminder Categories
   > CL   CPRS Lookup Categories
   > CS   CPRS Cover Sheet Reminder List
   > MH   Mental Health Dialogs Active
   > PN   Progress Note Headers
   > RA   Reminder GUI Resolution Active
   > TIU   TIU Template Reminder Dialog Parameter
   > DL   Default Outside Location
   > PT   Position Reminder Text at Cursor
   >
   > Select CPRS Reminder Configuration Option: **TIU** TIU Template Reminder Dialog
   > Parameter

Reminder Dialogs allowed as Templates may be set for the following:
```
      1   User       USR   [choose from NEW PERSON]
      3   Service     SRV   [choose from SERVICE/SECTION]
      4   Division    DIV   [choose from INSTITUTION]
      5   System      SYS   [NATREM.FO-SLC.MED.VA.GOV]
```

Enter selection: **5** *Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level*
Setting Reminder Dialogs allowed as Templates for System:
Select Display Sequence: **?**

```
      148          VA-VETERANS CHOICE NOTE
      149          VA-TBI SCREENING
      151          VACO TRANSPLANT REFERRAL (D)
```

When you type a question mark above, you will see the list of #'s (with dialogs) that are already taken. Choose a number NOT on this list. For this example, looking above I see the number 150 is not present, so I will use 150.

Select Display Sequence: **150**
Are you adding 150 as a new Display Sequence? Yes// **Y   YES**
Display Sequence: 150// **<Enter>**
Clinical Reminder Dialog:
VA-PHARMACOGENOMIC TESTING FOR VETERANS **Enter>**
OK? Yes// **<Enter>** (Yes)

2. Setup of Note title

The new note title that needs to be created is:
PHARMACOGENOMICS NOTE

This note title is to be mapped to the following VHA Enterprise Standard Title:
HEMATOLOGY AND ONCOLOGY NOTE

Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the TIU/ASU Implementation Guide

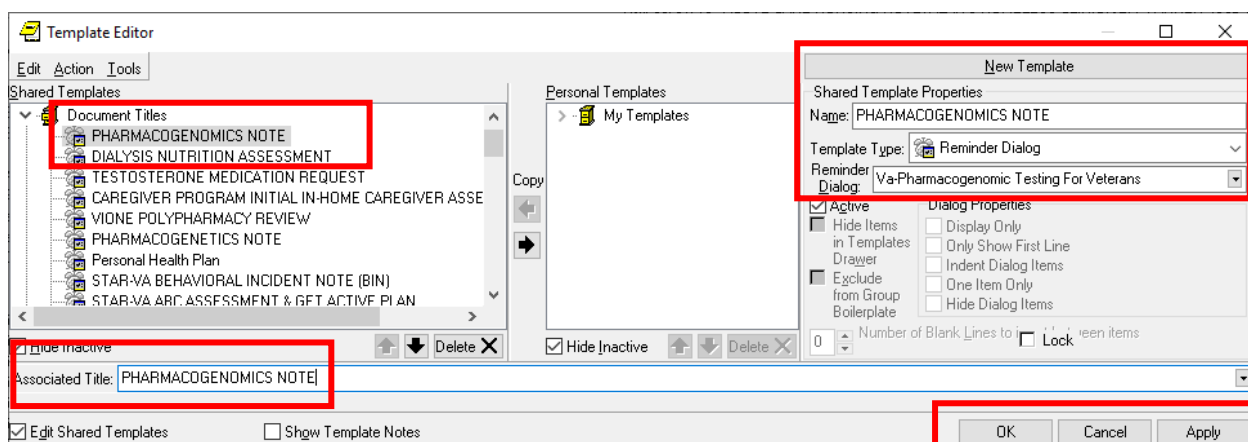## 3. Associate the reminder dialog with the note title in CPRS

To do this, go to Template Editor, then Document Titles, select the appropriate folder (if applicable), and choose New Template (top right-hand corner).
Type in the following information:
Name: **PHARMACOGENOMICS NOTE**
Template Type: Reminder Dialog
Reminder Dialog: **VA-PHARMACOGENOMIC TESTING FOR VETERANS**

Next, type in the Associated Title, which in this case is
PHARMACOGENOMICS NOTE and hit Apply.

For TECHNICAL questions regarding any of the remaining Post-Install steps, please contact:
Susan Rozelle (Susan.Rozelle@va.gov)
Russell Jacobitz (Russell.Jacobitz@va.gov)

4. **Create a NEW User Class** and Set up Group to be Viewable Only for Specific User Class**:**

In the template, only trained personnel should be able to record lab panel results into patients' charts. To facilitate this, sites need to create a new user class called **PGX AUTHORIZED STAFF**.

After creating PGX AUTHORIZED STAFF, assign this to staff at your site who will be authorized to enter lab results in patients' charts through the template.

Steps to Create User Class:
From User Class Management Menu:

```
            --- User Class Management Menu ---

     1      User Class Definition
     2      List Membership by User
     3      List Membership by Class
     5      Manage Business Rules
```

Select User Class Management Option: **1** User Class Definition

Select User Class Status: ACTIVE// <enter> Active
        Start With Class: FIRST// <enter>
           Go To Class: LAST// <enter>
Searching for the User Classes.............

User Classes   Apr 22, 2019@07:42:52   Page: 1 of 9
                    ACTIVE USER CLASSES   122 Classes

```
        Class Name                          Abbrev
1   ALLERGIST                               ALLRG
2   ALLERGY & IMMUNOLOGY                    ADR
3   ANESTHESIOLOGIST                        ANES
4   ASSOCIATE CHIEF OF STAFF                ACOS
5   ATTENDING PHYSICIAN                     ATT
6   AUDIOLOGIST                             AUD
7   CARDIOLOGIST                            CARD
8   CHAPLAIN                                CHAP
9   +CHIEF RESIDENT                         CR
10  CHIEF, MEDICAL SERVICE                  CMED
11  CHIEF, MIS                              CMIS
12  CHIEF, PSYCHIATRY SERVICE               CPSYCH
13  CHIEF, SURGICAL SERVICE                 CSURG
14  CLINICAL CLERK                          CLCLRK
15  +CLINICAL COORDINATOR                   CLPAC
+        + Next Screen  - Prev Screen  ?? More Actions
    Find                Expand/Collapse Class   Change View
    Create a Class      List Members            Quit
    Edit User Class
Select Action: Next Screen// CR   Create a Class
Select CLASS: PGX AUTHORIZED STAFF
Are you adding 'PGX AUTHORIZED STAFF' as a new USR CLASS (the 126TH)? No// Y
NAME: PGX AUTHORIZED STAFF Replace <enter>
DISPLAY NAME: Pgx Authorized Staff Replace <enter>
ABBREVIATION: <enter>
ACTIVE: 1 Active
Select SUBCLASS: <enter> ............
```

** You will need to assign this newly created User Class to any staff who are authorized to
   record the pharmacogenomic test results into patients' charts. **

Map User Class into Reminder Term:
After creating and assigning the User Class to appropriate staff, navigate to the Reminder
Term VA-PGX AUTHORIZED STAFF and map the user class into the Computed Finding
Parameter of Finding #1 (VA-ASU USER CLASS).

By doing this, VistA will suppress the group VA-GP PHASER TEST RESULTS if the
person using the template does *not* have the PGX AUTHORIZED STAFF User Class.

From Reminder Managers Menu:

```
  CF          Reminder Computed Finding Management ...
  RM          Reminder Definition Management ...
  SM          Reminder Sponsor Management ...
  TXM         Reminder Taxonomy Management
  TRM         Reminder Term Management ...
  LM          Reminder Location List Management ...
  RX          Reminder Exchange
  RT          Reminder Test
  OS          Other Supporting Menus ...
  INFO        Reminder Information Only Menu ...
  DM          Reminder Dialog Management ...
  CP          CPRS Reminder Configuration ...
```

```
     RP          Reminder Reports ...
     MST         Reminders MST Synchronization Management ...
     PL          Reminder Patient List Menu ...
     PAR         Reminder Parameters ...
     VS          NLM Value Set Menu
     ROC         Reminder Order Check Menu ...
     CQM         NLM Clinical Quality Measures Menu
     XM          Reminder Extract Menu ...
     GEC         GEC Referral Report


Select Reminder Managers Menu Option: TRM Reminder Term Management
    TL    List Reminder Terms
    TI    Inquire about Reminder Term
    TE    Add/Edit Reminder Term
    TC    Copy Reminder Term


Select Reminder Term Management Option: TE Add/Edit Reminder Term


Select Reminder Term: VA-PGX AUTHORIZED STAFF      NATIONAL
     ...OK? Yes// <enter> (Yes)


Choose from:

CF VA-ASU USER CLASS                           Finding #   1
Select Finding: `1 VA-ASU USER CLASS


Computed Finding Description:
This multi-occurrence computed finding returns a list of the ASU
User Classes that the user belongs to. The user is the person who is
running the reminder evaluation or processing a reminder dialog.
  Cont'd
  .
  .
Editing Finding Number: 1
FINDING ITEM: VA-ASU USER CLASS// <enter>
BEGINNING DATE/TIME: T// <enter>
ENDING DATE/TIME: T// <enter>
OCCURRENCE COUNT: <enter>
COMPUTED FINDING PARAMETER: PGX AUTHORIZED STAFF
CONDITION: <enter>
CONDITION CASE SENSITIVE: <enter>
USE STATUS/COND IN SEARCH: <enter>


Choose from:

CF VA-ASU USER CLASS                           Finding #   1
Select Finding: <enter>

Input your edit comments.
Edit? NO// <enter>
```

5. Creating/Attaching Laboratory Test Quick Order

The pharmacogenomic lab panel is to be available for ordering through this template.

** Lab personnel at your site will need to create the new lab test before you will be able to use it in this quick order. If you are unsure who needs to be creating this lab test, please contact Jennifer Chapman (PHASER Program Manager) at Jennifer.Chapman2@va.gov to obtain further information. **

Below are instructions for building the quick order AND for attaching the quick order as a finding item to the appropriate element.

Use your facility's naming convention for this order. It can be set to auto-accept if desired. This example demonstrates setting auto-accept to yes.

Creating quick order:

From the Order Menu Management Option:

```
OI      Manage orderable items ...
PM      Enter/edit prompts
GO      Enter/edit generic orders
QO      Enter/edit quick orders
QU      Edit personal quick orders by user
ST      Enter/edit order sets
AC      Enter/edit actions
MN      Enter/edit order menus
AO      Assign Primary Order Menu
CP      Convert protocols
SR      Search/replace components
LM      List Primary Order Menus
DS      Disable/Enable order dialogs
CS      Review Quick Orders for Inactive ICD9 Codes
MR      Medication Quick Order Report
CA      Quick Order Mixed-Case Report
CO      Create Clinic Order QOs from Inpatient QOs
CV      Convert IV Inpatient QO to Infusion QO
DF      Quick Order Free-Text Report
FR      IV Additive Frequency Utility
SP      SUPPLY COVERSION UTILITY MENU ...
```

Select Order Menu Management Option: **QO** Enter/edit quick orders
Select QUICK ORDER NAME: **LRZ PGX PANEL ONCE SP AA** (use naming convention here)
  Are you adding 'LRZ PGX PANEL ONCE SP AA' as a new ORDER DIALOG? No// **Y** (Yes)
TYPE OF QUICK ORDER: **LABORATORY**
NAME: LRZ PGX PANEL ONCE SP AA Replace **<enter>**
DISPLAY TEXT: **Pharmacogenomics Panel**
VERIFY ORDER: **NO**
DESCRIPTION:
Edit? NO// Hit 'Y' to enter a description here if your facility does this; otherwise hit <enter>

Lab Test: ==Type in the name of the lab test here==

SEND TO LAB - Means the patient is ambulatory and will be sent to the
Laboratory draw room to have blood drawn.
WARD COLLECT - Means that either the physician or a nurse will be collecting the sample on the ward.
LAB BLOOD TEAM - Means the phlebotomist from Lab will draw the blood on the ward. This method is
limited to laboratory defined collection times.

    SP   Send patient to lab
    WC   Ward collect & deliver
    LC   Lab blood team
Collected By: **SP** Send patient to lab
Collection Sample: BLOOD // ==<enter>==
Collection Date/Time: ==<enter>==
Urgency: **ROUTINE** (can change to STAT according to facility's process)
How often: **ONCE**

                    Lab Test: Name of lab panel here
                Collected By: Send patient to lab
            Collection Sample: BLOOD
                    Specimen: BLOOD
          Collection Date/Time: TODAY
                    How often: ONCE

(P)lace, (E)dit, or (C)ancel this quick order? PLACE// ==<enter>==
Auto-accept this order? NO// ==<enter>==

Attaching quick order as finding item to element:
Below are the steps to add your quick order to the appropriate element.

Element name: VA-EL PHASER ORDER PT AGREES

From Reminder Managers Menu:

    CF   Reminder Computed Finding Management ...
    RM   Reminder Definition Management ...
    SM   Reminder Sponsor Management ...
    TXM   Reminder Taxonomy Management
    TRM   Reminder Term Management ...
    LM   Reminder Location List Management ...
    RX   Reminder Exchange
    RT   Reminder Test
    OS   Other Supporting Menus ...
    INFO   Reminder Information Only Menu ...
    DM   Reminder Dialog Management ...
    CP   CPRS Reminder Configuration ...
    RP   Reminder Reports ...
    MST   Reminders MST Synchronization Management ...
    PL   Reminder Patient List Menu ...
    PAR   Reminder Parameters ...
    VS   NLM Value Set Menu

```
        ROC              Reminder Order Check Menu ...
        CQM              NLM Clinical Quality Measures Menu
        XM               Reminder Extract Menu ...
        GEC              GEC Referral Report
```

Select Reminder Managers Menu Option: **DM** Reminder Dialog Management

```
    DP   Dialog Parameters ...
    DI   Reminder Dialogs
    DR   Dialog Reports ...
    IA   Inactive Codes Mail Message
```

Select Reminder Dialog Management Option: **DI** Reminder Dialogs

Dialog List   Apr 22, 2019@07:28:03   Page: 1 of   22
REMINDER VIEW (ALL REMINDERS BY NAME)

```
 Item Reminder Name                     Linked Dialog Name & Dialog Status
   1 ACUTE MYOCARDIAL INFARCTION
   2 AGP TEST                           AGP TEST ALL DIALOG
   3 AJM BL TEST
   Cont'd
   .
+       Enter ?? for more actions                  >>>
AR   All reminders        LR  Linked Reminders   QU  Quit
CV   Change View          RN  Name/Print Name
```
Select Item: Next Screen// **CV**   Change View

     Select one of the following:

```
        D              Reminder Dialogs
        E              Dialog Elements
        F              Forced Values
        G              Dialog Groups
        P              Additional Prompts
        R              Reminders
        RG             Result Group (Mental Health)
        RE             Result Element (Mental Health)
```

TYPE OF VIEW: R// **E** Dialog Elements

Dialog List   Apr 22, 2019@07:28:08   Page: 1 of 1133
DIALOG VIEW (DIALOG ELEMENTS)

```
 Item    Dialog Name                      Dialog Type        Status
   1      00 SPACER BOTH                   Dialog Element
   2      00 SPACER NOTE ONLY (E)          Dialog Element
   3      10-0386-SCH APPROVAL AUTH1       Dialog Element
   Cont'd
   .
   .
   .
+      + Next Screen   - Prev Screen   ?? More Actions        >>>
AD   Add          PT  List/Print All    QU  Quit
CO   Copy Dialog        INQ  Inquiry/Print
```

```
CV   Change View        TE   Dialog Taxonomy Edit
Select Item: Next Screen// SL    SL
Search for: VA-EL PHASER ORDER PT AGREES
Dialog List            Apr 22, 2019@07:29:36    Page: 494 of 1133
DIALOG VIEW (DIALOG ELEMENTS)


+Item Dialog Name                                    Dialog type       Status
 6909  VA-EL PHASER ORDER PT AGREES                  Dialog Element
 6910  VA-EL PHASER ORDER PT DECLINES                Dialog Element
 6911  VA-EL SAFETY PLAN COLLABORATION TIP           Dialog Element
 6912  VA-EL SAFETY PLAN CONTACTS DECLINED           Dialog Element
 6913  VA-EL SAFETY PLAN CONTACTS INFO               Dialog Element
 6914  VA-EL SAFETY PLAN CONTACTS TIP DETAILS        Dialog Element
Cont'd
.
+      + Next Screen  - Prev Screen  ?? More Actions        >>>

Find Next 'VA-EL PHASER ORDER PT AGREES'? Yes// NO


+Item Dialog Name                                    Dialog type       Status
 6909  VA-EL PHASER ORDER PT AGREES                  Dialog Element
 6910  VA-EL PHASER ORDER PT DECLINES                Dialog Element
 6911  VA-EL SAFETY PLAN COLLABORATION TIP           Dialog Element
 6912  VA-EL SAFETY PLAN CONTACTS DECLINED           Dialog Element
 6913  VA-EL SAFETY PLAN CONTACTS INFO               Dialog Element
 6914  VA-EL SAFETY PLAN CONTACTS TIP DETAILS        Dialog Element
Cont'd
.
+      + Next Screen  - Prev Screen  ?? More Actions        >>>
AD   Add           PT   List/Print All    QU   Quit
CO   Copy Dialog       INQ  Inquiry/Print
CV   Change View        TE   Dialog Taxonomy Edit
Select Item: Next Screen// 6909    (your number will most likely be different)

Dialog Name: VA-EL PHASER ORDER PT AGREES

Current dialog element/group name: VA-EL PHASER ORDER PT AGREES
Used by:  VA-GP PHASER ED MATERALS GIVEN (Dialog Group)
             VA-GP PHASER CONSENT DISCUSSED (Dialog Group)

FINDING ITEM: VA-PGX TESTING ACCEPTED// **do not remove this health factor**

Select ADDITIONAL FINDINGS: Q.LRZ PGX PANEL ONCE SP AA (Q.NAME OF QUICK
ORDER)

   Searching for a ORDER DIALOG, (pointed-to by ADDITIONAL FINDINGS)

   Searching for a ORDER DIALOG
 LRZ PGX PANEL ONCE SP AA
     ...OK? Yes// <enter> (Yes)
Select ADDITIONAL FINDINGS: <enter>
Input your edit comments.
Edit? NO// <enter>
```

6. Establish an IFC Pharmacogenomics E-Consult

The National Oncology Program Office is implementing an inter-facility e-consult as part of the PHASER Program. The IFC will provide facilities participating in the Program with a means to communicate with the PHASER program regarding assistance in interpretation of results of pharmacogenomic test results as well as additional questions regarding program participation. The IFC will serve as a means of provider to provider communication and no direct patient care services will be rendered by this e-consult.

A. CREATE the IFC PHARMACOGENOMICS E-CONSULT Service

SS   Set up Consult Services [GMRC SETUP REQUEST SERVICES]

```
SERVICE NAME: IFC PHARMACOGENOMICS E-CONSULT
ABBREVIATED PRINT NAME (Optional):
INTERNAL NAME:
Select SYNONYM:
SERVICE USAGE:
SERVICE PRINTER:
NOTIFY SERVICE ON DC:
REPRINT 513 ON DC:
PREREQUISITE:
  Edit? NO//
PROVISIONAL DX PROMPT: REQUIRE
PROVISIONAL DX INPUT: LEXICON
DEFAULT REASON FOR REQUEST:
  No existing text
  Edit? NO//
RESTRICT DEFAULT REASON EDIT:

Inter-facility information
IFC ROUTING SITE: 558
IFC REMOTE NAME: IFC PHARMACOGENOMICS E-CONSULT TO DURHAM

SERVICE INDIVIDUAL TO NOTIFY:
Select SERVICE TEAM TO NOTIFY:
Select NOTIFICATION BY PT LOCATION:
PROCESS PARENTS FOR NOTIFS:
Select UPDATE USERS W/O NOTIFICATIONS:
Select UPDATE TEAMS W/O NOTIFICATIONS:
Select UPDATE USER CLASS W/O NOTIFS:
Select ADMINISTRATIVE UPDATE USER:
Select ADMINISTRATIVE UPDATE TEAM:
ADMINISTRATIVE UPDATE TEAM:
NOTIFICATION RECIPIENTS:
Select ADMINISTRATIVE UPDATE TEAM:
PROCESS PARENTS FOR UPDATES:

SPECIAL UPDATES INDIVIDUAL:
RESULT MGMT USER CLASS:
UNRESTRICTED ACCESS:
Select SUB-SERVICE/SPECIALTY:
ADMINISTRATIVE:
```

B. **ADD** the new consult service IFC PHARMACOGENOMICS E-CONSULT as a subservice/specialty to the appropriate grouper. This may be your site's IFC specific grouper or a grouper used for Oncology consults.

SERVICE NAME: <mark>NAME OF YOUR SITE'S GROUPER HERE</mark> Replace
ABBREVIATED PRINT NAME (Optional):
INTERNAL NAME:
Select SYNONYM:
SERVICE USAGE: GROUPER ONLY//
SERVICE PRINTER:
(some fields omitted to save space)
.
SPECIAL UPDATES INDIVIDUAL:
RESULT MGMT USER CLASS:
UNRESTRICTED ACCESS:
Select SUB-SERVICE/SPECIALTY: <mark>IFC PHARMACOGENOMICS E-CONSULT</mark>
  Are you adding 'IFC PHARMACOGENOMICS E-CONSULT' as
    a new SUB-SERVICE? No// <mark>Y</mark> (Yes)
  MNEMONIC:
Select SUB-SERVICE/SPECIALTY:
ADMINISTRATIVE:

Add/Edit Another Service? NO//

C. **IMPORT** the IFC reason for request template and link to the consult

Click the link below and then Click on the arrow next to "Save" to choose "Save as".

IFC Pharmacogenomics E-Consult TXML Template
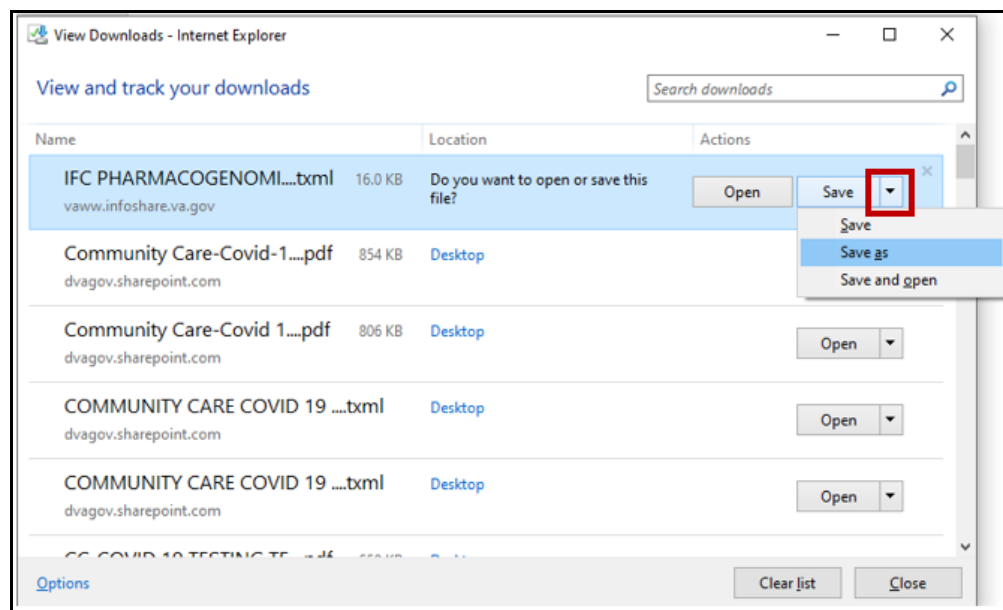
Save the TXML template to your Desktop.
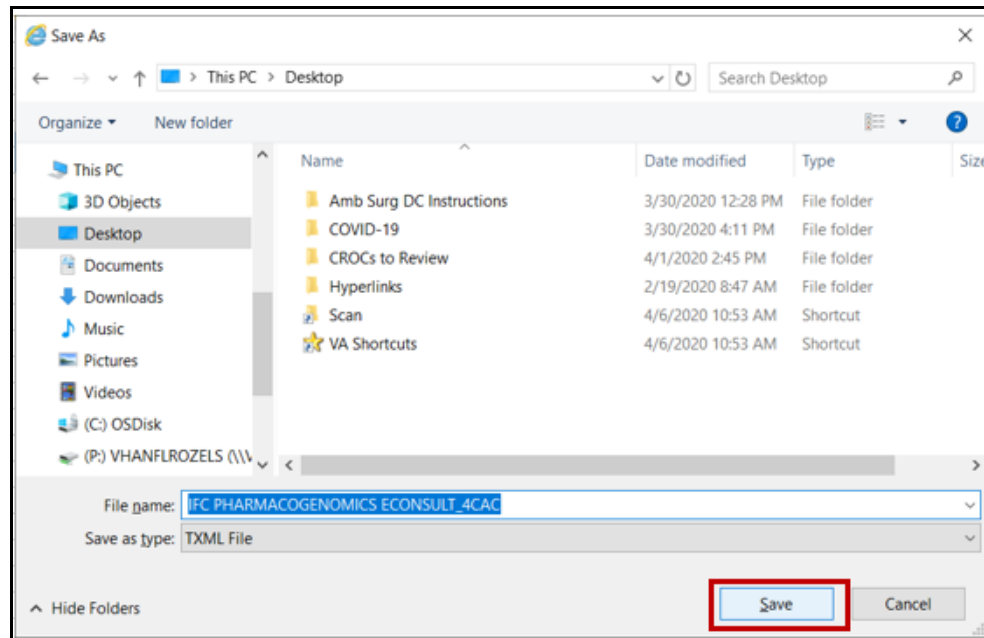
In CPRS Notes tab on the Tools bar, click on Options → Edit Shared Templates…
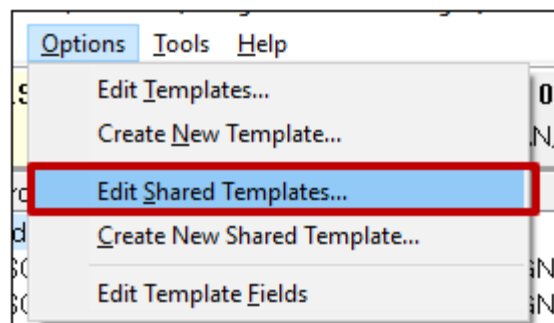
In CPRS template editor, go to the Consult Reasons for Request folder.
Click on the Consult Reasons for Request to highlight it and expand this folder by double-clicking on the name or clicking on the 'triangle' to left of the folder name.
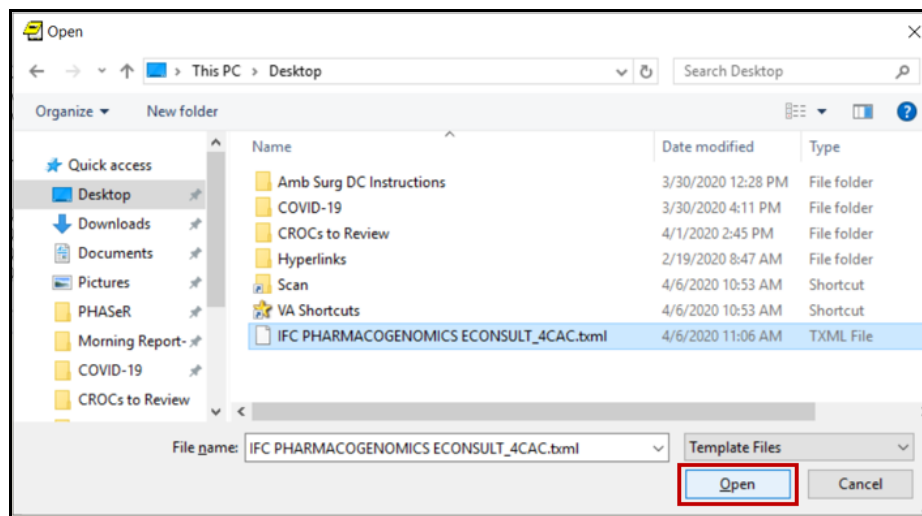
Select the folder you wish to add the consult template to (in this example - IFC Consults).
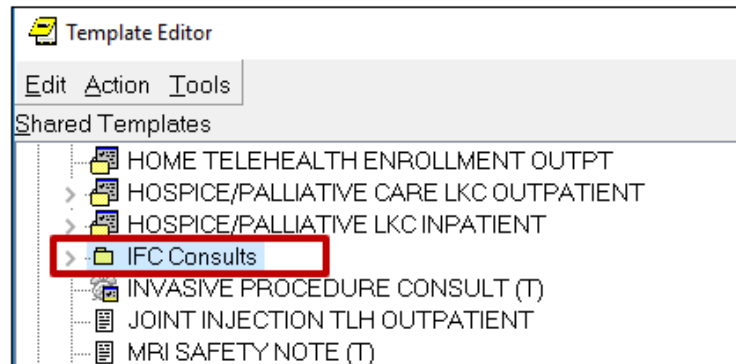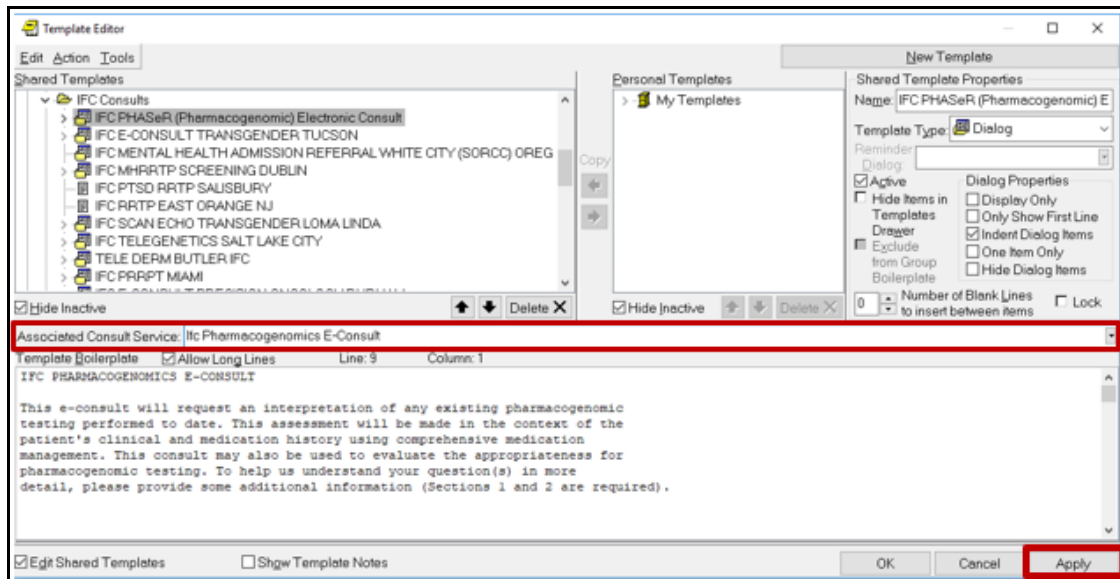

On the Tools bar, select Tools → Import Template
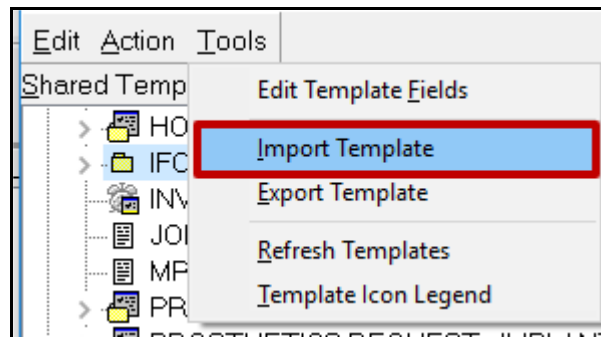
Select the template from where you saved it and click on 'Open' to import the template.

Select the template by clicking on it. In the Associated Consult Service box, type:
IFC PHARMACOGENOMICS E-CONSULT
Click Apply to save and link the template to the consult service.

D. CREATE a quick order for the consult service

Use your site's naming convention for the quick order.

Select Order Menu Management Option: **QO** Enter/edit quick orders

Select QUICK ORDER NAME: **GMRCTZ IFC PHARMACOGENOMICS E-CONSULT**
  Are you adding 'GMRCTZ IFC PHARMACOGENOMICS E-CONSULT' as
    a new ORDER DIALOG? No// **Y** (Yes)
TYPE OF QUICK ORDER: **CONSULTS**
NAME: GMRCTZ IFC PHARMACOGENOMICS E-CONSULT Replace **<enter>**
DISPLAY TEXT: **IFC Pharmacogenomics E-Consult**
VERIFY ORDER:
DESCRIPTION:
  Edit? NO//

Consult to Service/Specialty: **IFC PHARMACOGENOMICS E-CONSULT**
Consult Type:
Reason for Request:
  No existing text
  Edit? No// (No)
Category: **OUTPATIENT**
Urgency: ROUTINE//
Clinically Indicated Date://
Place of Consultation:
Attention:
Provisional Diagnosis:

    Consult to Service/Specialty: IFC PHARMACOGENOMICS E-CONSULT
                    Category: OUTPATIENT
                     Urgency: ROUTINE
        Clinically Indicated Date:

    (P)lace, (E)dit, or (C)ancel this quick order? PLACE//

Auto-accept this order? NO//

IMPORTANT: Work with your local stakeholders to ensure this quick order is placed in all ordering menus/locations that will be conducive to local workflow processes.

E. **Notify Durham VAMC** to coordinate configuration on their side (as a receiving site). Email Durham VAMC (vhadurcac@va.gov) to notify that your site is adding this IFC. They will need your site's *station number* to add your site to Durham's set-up

F. **TEST the IFC configuration**
   After Durham has added your site to their set-up, test the IFC configuration to ensure it has been successfully configured.

   Select Consult Management Option: <mark>IFC</mark> IFC Management Menu

   ```
   TI      Test IFC implementation
   LI      List incomplete IFC transactions
   IFC     IFC Requests
   TR      IFC Transaction Report
   LK      Locate IFC by Remote Cslt #
   BK      Monitor IFC background job parameters
   AI      Print All Incomplete IFC Transactions
   EP      Edit IFC Processing Parameters
   IP      IFC Requests By Patient
   IR      IFC Requests by Remote Ordering Provider
   MP      Configure test account patients for IFC
   PI      Print IFC Requests
   ```

   Select IFC Management Menu Option: <mark>TI Test IFC implementation</mark>

      Select one of the following:

         P   procedure
         C   consult service

      Would you like to test a procedure or consult service: <mark>Consult service</mark>

      Select the Consult service that you'd like to test: <mark>IFC PHARMACOGENOMICS E-CONSULT</mark>

      attempting to connect to remote system...

   Congratulations! You're configured correctly.

   Would you like to test another implementation? <mark>N</mark>

   If you see an error message, please work with the host site to correct any configuration issues.

G. SUPPORT

For questions/issues about the CLINICAL CONTENT of the template/consult, contact:

Jill Bates (Jill.Bates@va.gov)

For TECHNICAL issues/problems regarding the template/consult, please contact:

Susan Rozelle (Susan.Rozelle@va.gov)

Russell Jacobitz (Russell.Jacobitz@va.gov)

7. Limiting PHASER PGX Lab Test Access

Obtaining informed consent for genetic tests is required by VHA Handbook 1004.01 (Informed Consent for Clinical Treatments and Procedures). The reminder dialog associated with the PHARMACOGENOMICS NOTE in VistA/CPRS is designed to document a patient's consent decision in a progress note before the PGX lab test is ordered.

Without restricting the lab order to quick order only, it is possible to bypass the reminder dialog and order the PGX lab test without recording patient consent. This document describes the steps sites need to take to restrict the lab test to quick order only.

A. Restrict the lab test to quick order only (from Order Menu Management Option)

```
OI      Manage orderable items ...
PM      Enter/edit prompts
GO      Enter/edit generic orders
QO      Enter/edit quick orders
QU      Edit personal quick orders by user
ST      Enter/edit order sets
AC      Enter/edit actions
MN      Enter/edit order menus
AO      Assign Primary Order Menu
CP      Convert protocols
SR      Search/replace components
LM      List Primary Order Menus
DS      Disable/Enable order dialogs
CS      Review Quick Orders for Inactive ICD9 Codes
MR      Medication Quick Order Report
CA      Quick Order Mixed-Case Report
CO      Create Clinic Order QOs from Inpatient QOs
CV      Convert IV Inpatient QO to Infusion QO
DF      Quick Order Free-Text Report
FR      IV Additive Frequency Utility
SP      SUPPLY COVERSION UTILITY MENU ...
```

Select Order Menu Management Option: **OI** Manage orderable items

```
OI      Enter/edit orderable items
QO      Enter/edit QO restriction
SR      Search/replace orderables
VB      Edit VBECS item display names
```

Select Manage orderable items Option: **QO** Enter/edit QO restriction

Select an ORDERABLE ITEM (meds or labs only): **Pharmacogenomics Panel Test (PHASER)**

Select the type of usage for which you wish to restrict ordering of this item.
Usage: **LABORATORY**
QO ONLY: **YES** YES

Usage: <enter>
Select an ORDERABLE ITEM (meds or labs only): <enter>

B. Since the lab will only be available via quick order, all fields in the quick order need to be defaulted. Below is an example; some of your fields (i.e., Display Text) may look different and may not be blank if you had previously defaulted them when initially building the quick order. For this example, the Collection Date/Time is defaulted to "Today".

Select Order Menu Management Option: **QO** Enter/edit quick orders

Select QUICK ORDER NAME: **LRZ PGX PANEL ONCE SP AA** <name of your quick order here>
NAME: LRZ PGX PANEL ONCE SP AA Replace <enter>
DISPLAY TEXT: Pharmacogenomic Panel Replace <enter>
VERIFY ORDER: **NO**
DESCRIPTION:
 Edit? NO//

Lab Test: Pharmacogenomics Panel Test (PHASER)// <enter>

Collected By: Send patient to lab// <enter>
Collection Sample: BLOOD// <enter>
Collection Date/Time: **TODAY**
Urgency: ROUTINE// <enter>
How often: ONCE// <enter>

```
------------------------------------------------------------------
         Lab Test: Pharmacogenomics Panel Test (PHASER)
      Collected By: Send patient to lab
  Collection Sample: BLOOD
         Specimen: BLOOD
Collection Date/Time: TODAY
          Urgency: ROUTINE
        How often: ONCE
------------------------------------------------------------------
```

(P)lace, (E)dit, or (C)ancel this quick order? PLACE// <enter>
Auto-accept this order? **YES**

C. Do a search and replace on the quick order to ensure the quick order is *not* living on any ordering menus outside of the reminder dialog.

Select Order Menu Management Option: **SR** Search/replace components
Search for: **LRZ PGX PANEL ONCE SP AA** <name of your quick order here>

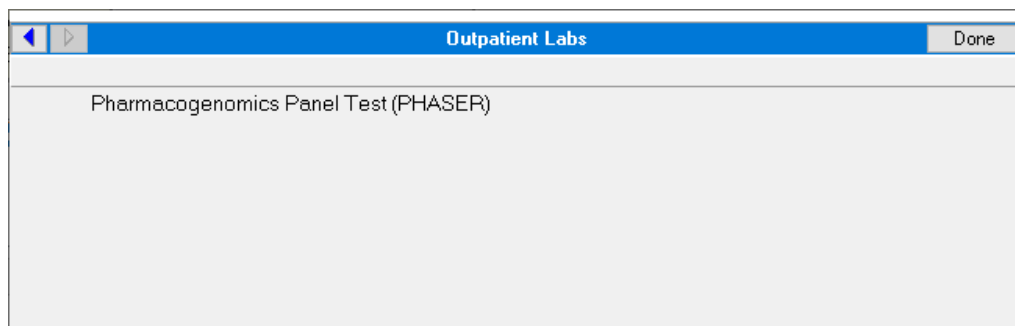LRZ PGX PANEL ONCE SP AA has no menu items.

Search for: <enter>

What is displayed in the example above indicates the quick order is not on any ordering menus (outside of the dialog). If any menus are listed above, ensure those are removed so that providers cannot get to the quick orders outside of going through the reminder dialog.
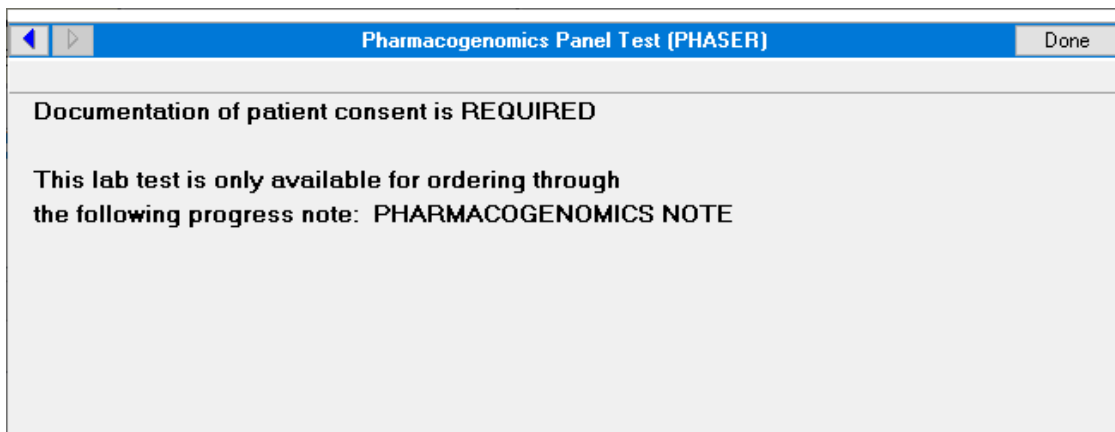
D. Because the lab test is no longer available directly from the lab dialog, sites may choose to do one or both of the following to help direct providers looking for the lab test.

Both choices are optional; sites are not required to take these steps but may find them useful in creating awareness of the lab test's location.

Option #1: Place helper text on an ordering menu directing providers that consent is required, and the test is available through the PHARMACOGENOMICS NOTE

◀ ▷	Outpatient Labs	Done
	Pharmacogenomics Panel Test (PHASER)	

Clicking on the above would lead to further guidance; see below example:

◀ ▷	Pharmacogenomics Panel Test (PHASER)	Done
	Documentation of patient consent is REQUIRED This lab test is only available for ordering through the following progress note: PHARMACOGENOMICS NOTE	

Option #2: Work with your site's Lab IM/ADPAC to create a 'fake' lab test entry as a placeholder; by using a synonym, this will enable the placeholder to still show up in the lab dialog list but will give providers direction to use the appropriate note. Below is an example of the information the IM/ADPAC can use to set this up.
 NUMBER: 8252
 NAME: ORDER VIA PHARMACOGENOMICS NOTE

TYPE: INPUT (CAN BE ORDERED)
SUBSCRIPT: CHEM, HEM, TOX, SER, RIA, ETC.
LOCATION (DATA NAME): CH;576503;1
LAB COLLECTION SAMPLE: <leave blank>
FIELD: DD(63.04,576503,
HIGHEST URGENCY ALLOWED: ROUTINE
REQUIRED TEST: YES   PRINT NAME: PHASER TEST
DATA NAME: PHARMACOGENOMICS NOTE
SYNONYM: Pharmacogenomics Panel Test
GENERAL WARD INSTRUCTIONS: Consent required; this lab test is only available for
ordering through the PHARMACOGENOMICS NOTE.
INSTITUTION: <Institution name here>
CREATION DATE: DEC 09, 2019
AUDIT DATE/TIME: DEC 09, 2019@12:16:07
AUDIT DATE/TIME: DEC 09, 2019@12:23:54
INPUT TRANSFORM (c): K:$L(X)>50!($L(X)<1) X
DATA TYPE (c): FREE TEXT

Screenshot example:

8. Setting up PHARMACOGENOMICS NOTE as a Posting

This step is optional but *highly recommended* to increase visibility of
the patient's Pharmacogenomics information. To set up the
PHARMACOGENOMICS NOTE as a Posting with auto-demotion set-up,
follow the steps below. If your site does not typically support Postings of this
type, please notify Jennifer Chapman (PHASER Program Manager) at:
Jennifer.Chapman2@va.gov

A. **Move PHARMACOGENOMICS NOTE** to the CLINICAL WARNING document class

B. **Create a second note title** that will be used as the auto-demotion target title

Document Class: **ONCOLOGY SERVICE** (or similar equivalent)

Name: **PHARMACOGENOMICS NOTE - HISTORICAL**

VHA Enterprise Standard Title: **HEMATOLOGY AND ONCOLOGY NOTE**

** Important: Leave this second note title in a status of INACTIVE to avoid having it show up in CPRS as a note title to choose **

C. **Auto-Demotion Setup**

To finish the Auto-Demotion Setup for this note, navigate to the Text Integration Utilities (MIS Manager) menu in VistA.

```
                    --- MIS Managers Menu ---
        1    Individual Patient Document
        2    Multiple Patient Documents
        3    Print Document Menu ...
        4    Search for Selected Documents
        5    Statistical Reports ...
        6    Unsigned/Uncosigned Report
        7    Missing Text Report
        9    Signed/unsigned PN report and update
        10   UNKNOWN Addenda Cleanup
        11   Missing Expected Cosigner Report
        12   Mark Document as 'Signed by Surrogate'
        13   Mismatched ID Notes
        14   TIU 215 ANALYSIS ...
        15   Transcription Billing Verification Report
        17   CWAD/Postings Auto-Demotion Setup
```

Select Text Integration Utilities (MIS Manager) Option: **17** CWAD/
Postings Auto-Demotion Setup
TITLE
Std Title: HEMATOLOGY AND ONCOLOGY NOTE

Select a NON-Posting TITLE as the demotion target: **PHARMACOGENOMICS NOTE - HISTORICAL**   TITLE
Std Title: HEMATOLOGY AND ONCOLOGY NOTE

Done. Post-Signature code has been set (or reset) as follows...
TITLE: PHARMACOGENOMICS NOTE
POST-SIGNATURE ACTION: D SILENT^TIUCWD(4369,4370)

NOTE: If you require further technical assistance, if there are any questions or problems during the installation, please notify your local IT support to log a national help desk ticket Desk and have them submit a national ticket to:
Category: Enterprise Applications
Enterprise Application: VistA - Clinical Reminders
Assignment Group: NTL SUP Clin 2